



FOR PROFESSIONAL INVESTORS - 10/07/2025

DAILY REPORT

INDONESIA MARKET WRAP

EQUITY MARKET

Pushing Higher

JCI slightly strengthened and closed at 8,169 (+29 points or +0.36%) today. Shares across regional markets were mostly positive. Meanwhile, foreign investors recorded net outflow of IDR 89Bn today and rupiah was stabilized at IDR 16,540/USD.

Banking stocks were mostly positive as BBRI (+1.37%), BBCA (+1%), BMRI (+0.7%), and BNLI (+0.44%) all rose, except BBNI (-0.25%). Consumer names were mostly negative as KLBK (-0.93%), GGRM (-5.74%), MYOR (-3.18%), and ICBP (-3.16%) all closed lower, except INDF (+1.76%). Material stocks were mixed as BRPT (+3.5%) closed higher, while TPIA (-1.91%) closed lower. Retailer names were mostly negative as ACES (-0.93%), MAPA (-2.75%), and AMRT (-3.06%) all declined, except ERAA (+0.96%). Other movers were POLU (+20%), SSIA (+13.93%), FILM (-14.81%), and ENRG (-6.57%).

The Central Statistics Agency stated that rice commodities are still at a high price level, despite recording deflation in September at -0.13% MoM. This is due to the gadu harvest momentum and the distribution of SPHP program rice by Perum Bulog. BPS recorded the retail price of rice decreased by -0.13% MoM to Rp15,375/kg.

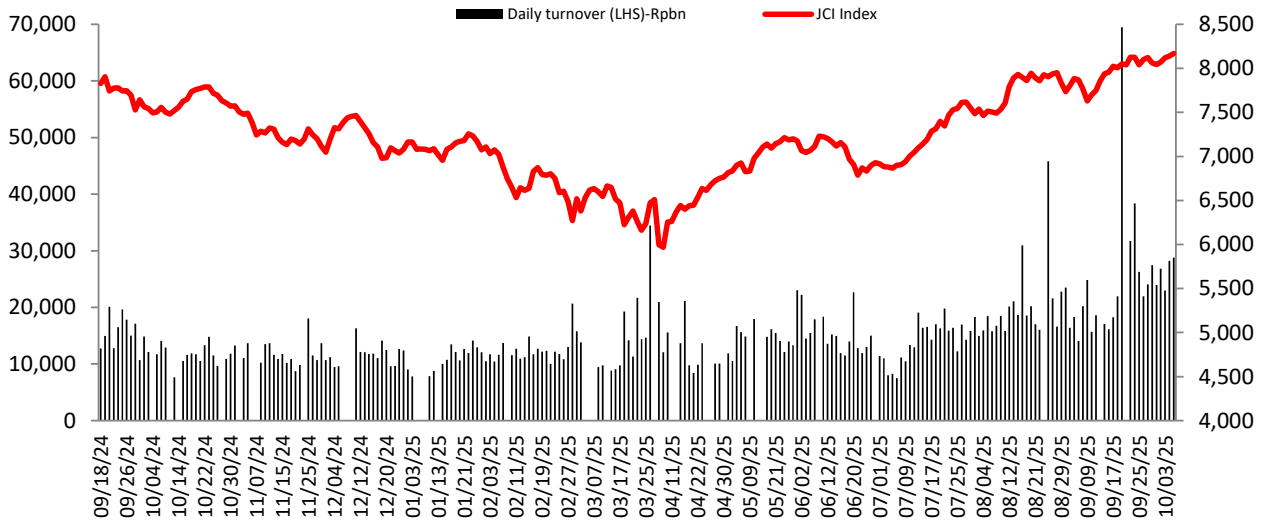
BOND MARKET

AUCTION DAY

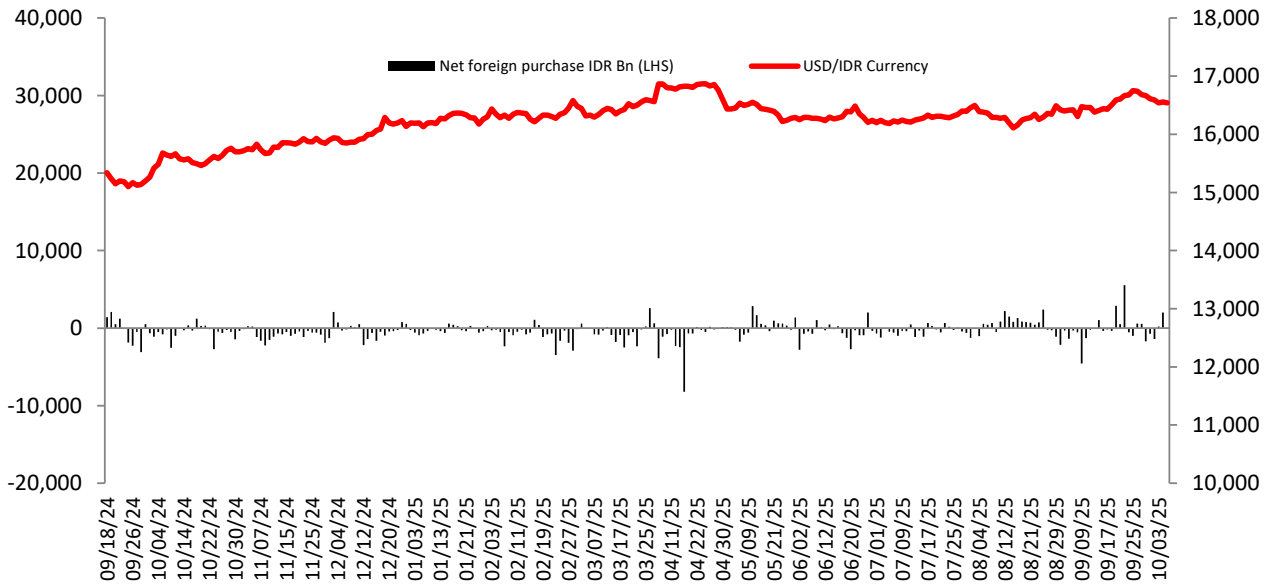
The bond market received solid interest from mixed players today following local currency posted below 16,570 level. Buying boosted prices level across the board. Overall sentiment was bullish. Overall yield curve closed slightly lower by 4 – 8 bps. In today auction, received incoming bids totaling at IDR 126.1574Tn. MoF managed to upsize the issuance IDR 28Tn from initial target, IDR 23Tn. The series absorbed (against incoming bids) on the auction were IDR 3Tn (IDR 4.855Tn) 12mo SPN, IDR 4.5Tn (IDR 19.0465Tn) 5Y FR109, IDR 6.35Tn (IDR 47.008Tn) 10Y FR108, IDR 4.05Tn (IDR 28.219Tn) 15Y FR106, IDR 3.3Tn (IDR 9.988Tn) 20Y FR107, IDR 3.75Tn (IDR 8.292Tn) 30Y FR102 and IDR 3.05Tn (IDR 7.739Tn) 40Y FR105 at weighted average yields of 4.73%, 5.35%, 6.21%, 6.67%, 6.78%, 6.85% and 6.88% respectively

GRAPHS & TABLES

JCI & DAILY TURNOVER



IDR & NET FOREIGN PURCHASES



EQUITY, BONDS AND CURRENCY SNAPSHOTS

	Bloomberg Code	Closed	% Chg. D-D	% Chg. YTD	Tenor
<u>Bonds</u>					
FR90	FR0090 Govt	100.3	0.0	4.3	5Y
FR91	FR0091 Govt	103.2	0.2	7.1	10Y
FR93	FR0093 Govt	99.7	0.1	5.2	15Y
FR92	FR0092 Govt	103.4	0.1	3.2	20Y
PBS036	INDOIS 5 ¼ 08/15/25	#N/A N/A	#VALUE!		15-8-2025
PBS003	INDOIS 6 01/15/27	101.4	0.0	3.5	15-01-2027
PBS037	INDOIS 6 ¾ 03/15/36	103.6	#VALUE!		15-03-2036
PBS033	INDOIS 6 ¾ 06/15/47	99.6	(0.0)		15-06-2047
<u>Asia Pacific</u>					
Jakarta Composite	JCI Index	8,169.3	0.4	15.4	
Thailand	SET Index	1,305.2	1.5	(6.8)	
Korean Stock Exch.	KOSPI Index	3,549.2	2.7	47.9	
Straight Times	FSSTI Index	4,472.3	1.1	18.1	
Kuala Lumpur	KLCI Index	1,630.0	(0.5)	(0.7)	
Philippines	PCOMP Index	6,083.8	1.4	(6.8)	
Nikkei	NKY Index	47,950.9	0.0	20.2	
Hang Seng	HSI Index	26,957.8	(0.7)	34.4	
MSCI-Asia pacific	MXAP Index	225.3	0.5	24.0	
<u>Global Indices</u>					
Dow Jones	INDU Index	46,695.0	(0.1)	9.8	
S&P 500	SPX Index	6,740.3	0.4	14.6	
Nasdaq	CCMP Index	22,941.7	0.7	18.8	
FTSE 100	UKX Index	9,478.8	(0.0)	16.0	

	Bloomberg Code	IDR	% Chg. D-D	% Chg. YTD
Spot IDR	IDR Currency	16,540.0	0.1	(2.6)
<u>Swap-IDR</u>				
1 month	IDSWT1M Index	16,600.0	(0.4)	2.1
3 month	IDSWT3M Index	16,605.5	(0.0)	(2.8)
6 month	IDSWT6M Index	16,590.0	0.0	(2.8)
<u>Forward-IDR</u>				
3 month	IDFWT3M Index	16,622.2	0.0	(2.8)
6 month	IDFWT6M Index	16,653.5	0.1	(2.7)

*price as of 10/6/2025

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